

World Learning/Macedonia

under contract to the United States Agency for International Development

bul. Kliment Ohridski 43 A 1st floor
Skopje 1000

phone: (389 2) 132 062
fax: (389 2) 298 725

A report prepared for the

USAID Local Government Reform Project

Development Alternatives, Inc.
3330-103
Skopje, Macedonia

In collaboration with

USAID/Macedonia
EEU-I-00-99-00012-00 #801

CONCEPT OF THE TRANSIT TRAINING PROGRAM

"BUILDING EFFECTIVE MUNICIPAL ASSOCIATIONS"

Background

Strong municipal associations are vital to the development of both sound national policy and effective local government. The training event "Building Effective Municipal Associations" is aimed to provide an additional support to the increased autonomy and responsibility for local governments in the Republic of Macedonia and to improve the ability of municipal associations to represent municipalities and their issues to the national government and to provide services to their member cities.

The training event will support officials and staff from the two municipal associations, ZELS (Association of the Units of Local Government of the Republic of Macedonia) and AFO (Finance Officers Association of the Local Governments and Public Enterprises of the Republic of Macedonia).

In March 2000, LGRP conducted comprehensive membership and leadership opinion surveys of the two organizations, ZELS and AFO. These comprehensive surveys were undertaken to ascertain the level of satisfaction of its members and leadership in terms of the organization's goals, objectives, services, activities, and organizational and governing structure. The information was used by the leadership to evaluate their respective organization's success in achieving stated goals and strategies as well to reassess and prioritize current strategies and future activities and plans. These surveys were both AFO and ZELS's first attempt to ask its membership, both the leadership and members at large, their opinion on how well they understand the mission and goals of the organization and their perceptions on how well they believe the association is achieving them. The



WORLD LEARNING
Founded in 1932 as
The Experiment in
International Living

World Learning/Macedonia

under contract to the United States Agency for International Development

survey also attempts to capture the level of satisfaction among the members regarding the organization's services and activities and to formally measure these responses. Comprehensive reports of the survey results were produced along with analysis and recommendations.

The ministry of Local Government has appointed three working groups to develop draft legislation relating to fundamental elements of the legal framework for local government: (1) amendments to the Law on Local Government originally enacted in 1995, (2) a new Law on Local Government Finance, and (3) amendments to the existing laws on the City of Skopje and the Territorial Division of the Country. Both ZELS and AFO have representatives on these working groups. In addition, the Association Development team is spearheading the project's integrated approach for designing and implementing a grass roots policy dialogue strategy. This strategy will be completed through the support and participation of AFO and ZELS. Its aim is to open the policy process to the general public and various constituencies in an effort effect the legislation and provide input to the central government regarding issues, opinions and concerns on the legislation.

Training Management

The training should be a course on theoretical and practical experiential skill building techniques on advocacy and lobbying. Participants should talk and spend time with the visited association's lobbying/advocacy staff, to be exposed to advocacy and lobbying techniques and have an opportunity to discuss how such practices, lessons, strategies could be adapted to the Macedonian context.

The course should include specific examples of successful campaigns for passage of successful legislation. The participants and the training provider(s) should apply these experience within the context of current legislative agenda/reforms in Macedonia and explore areas for application in Macedonia.

Some of the participants (in particular, the professional staff of the associations) should be given an opportunity to shadow their counterparts in US associations to expose them to the knowledge, skills needed to run the administrative side of the association and other relevant components of these organizations. Also, they should see how the different sectors work together, how they have mobilized governmental and public support, what membership services are offered, what lessons they have learned, what are best practices, how they have dealt with political and other issues.

Participants should be afforded the opportunity to attend association board meetings, observe lobbying events, organizational meetings, and other appropriate events which provide an opportunity for participants to observe and experience US association operations and activities. Also, participants should have an opportunity to experience and attend additional team-building sessions so that they can continue to build an effective working relationship in implementing many of the joint activities - particularly the policy reform community dialogue.

Finally, participants should develop a very concrete Action Plan that they will implement when they return.

Training Objectives

World Learning/Macedonia

under contract to the United States Agency for International Development

During the training, the participants should gain exposure to and hands-on experience, skills and knowledge that will afterwards enable them to:

- Explain what are the characteristics of a successful, service oriented municipal association;
- Gain better understanding of how can associations' improve their advocacy function? What is advocacy and lobbying and how are each practiced effectively;
- State what are the most effective ways to present, advocate, and promote their position before the government, citizens, parliament;
- Gather useful information and better understand what is the US experience in building successful coalitions in support of policy reforms;
- Observe what communication strategies can be implemented to members, government and the general public on local government;
- State what are the best practices and lessons learned with regard to the similar municipal associations in the United States;
- Learn how have these organizations build and maintain their membership base? What membership marketing strategies work?
- What can be done to minimize the politicization within the association? Within the governing board of these associations?
- Describe how can the associations generate revenues to fund their operations and activities?
- Analyze and provide information related to the Association Administration: How are similar associations organized, staffed, and managed?
- Adapt these practices to the Macedonian context.

By observing and learning the aforementioned points, the associations will be able to better serve their constituencies and the community at large.

USAID Strategic Objective/Intermediate Results related to this training program that they will fund

SO: 2.3 More effective responsive and accountable local government

I.R: 2.3.5 Municipal associations serve interests of local governments

I.R: 2.3.5.1 Associations are legitimately representing members

I.R: 2.3.5.2 Associations are financially and institutionally sustainable

Strong municipal associations are vital to the development of both, sound national policy and effective local government. The Association Development work of the LGRP (the project, sponsored by USAID) advises local governments and the Government of Macedonia in the areas of legislative policy reform, citizen participation, municipal management and the development of municipal associations. Also it involves close collaboration with the Association of the Units of Local Government of the Republic of Macedonia (ZELS) and the Finance Officers Association of the Local Governments and Public Enterprises of the Republic of Macedonia (AFO). Efforts are aimed at improving their ability to (1) represent municipalities and their issues to the national government and (2) improve their ability to provide services to their member cities.

World Learning/Macedonia

under contract to the United States Agency for International Development

Participants

The group will consist of people who are committed to working on local government issues and who have influence or involvement in some of the necessary sectors to help get the law on local self-government passed and who are going to actively participate in implementation activities. Participants will be members from the Association of the Units of Local Government of the Republic of Macedonia (ZELS) and from the Finance Officers Association of the Local Governments and Public Enterprises of the Republic of Macedonia (AFO). The group will include key officials from each organization's managing boards (including its President), one staff member from each association, and at least one member-at-large of the organization (particularly those which serve on a newly created association sub-committee).

Association of the Units of Local Government (ZELS)

1. Goran Angelov, President, Vinica
2. Eleonora Petrova – Mitevska, Vice President, Skopje
3. Dusica Perisic, Executive Director, Skopje
4. Asan Ljuma, Member of the Standing Committee, Tetovo
5. Stojan Jankov, Member of the Standing Committee, Negotino
6. Andon Smilevski, Member of the Standing Committee, Mavrovi Anovi
7. Romeo Dereban, Member of the Standing Committee, Struga
8. Ace Kocevski, General Membership, Veles

Back-ups: Ljupco Petkovski, Kriva Palanka

Ljube Bojkovski, Ilinden

Stefka Bogoevska, Veles

Finance Officers Association (AFO)

1. Maksim Acevski, President, Veles
2. Ema Gramatikova, Member of the Executive Board, Strumica
3. Pero Bogeski, Member of the Executive Board, Prilep

Expected results

World Learning/Macedonia

under contract to the United States Agency for International Development

More specifically, through the knowledge and skills gained during the study tour and the realization of the training objectives outlined earlier, the trainees will be responsible for the following:

- Both Associations must develop and build a strong coalition for promoting an appropriate Policy Reform Community Dialogue relating to the revisions/additions to the legal framework for local government currently underway in Macedonia. Specifically, the laws related to this legal framework include: (1) amendments to the Law on Local Government originally enacted in 1995, (2) a new Law on Local Government Finance, and (3) amendments to the existing laws on the City of Skopje and the Territorial Division of the Country.
- Improving membership services. This includes implementing effective membership marketing strategies for attracting and retaining members. In addition, they must not only identify new services, but they must examine the feasibility of expanding/improving services currently provided.
- Strategy building. Developing, implementing and evaluating strategies which will promote their organization's current and future financial sustainability. This includes developing program budgets, business plans, and improving financial management of current and future revenue sources.

Furthermore, at the conclusion of the training program, trainees will be able to:

- ◆ Describe and identify the key characteristics of a successful, service oriented municipal association.
- ◆ Describe the elements of effective advocacy and lobbying strategies.
- ◆ List at least 10 ways the association's can improve their advocacy function.
- ◆ Describe effective methods for presenting, advocating, and promoting their position before the government, citizens, parliament
- ◆ Identify the relevant US experience in building successful coalitions in support of policy reforms and adapt these experiences to the Macedonian context.
- ◆ Identify communication strategies which can be readily implemented for members, government and the general public on local government.
- ◆ Describe what lessons can be learned from similar municipal associations in the United States and describe how they have built and maintained their membership base.
- ◆ Develop an effective membership marketing strategy aimed at attracting new members and retaining current members.
- ◆ Identify strategies which help to minimize politicization within the association leadership and among its membership at large.
- ◆ List at least 5 realistic and pro-active ways their association can generate revenues to fund their current and future operations and activities.
- ◆ Describe how similar associations are organized, staffed, and managed.

World Learning/Macedonia

under contract to the United States Agency for International Development

- ◆ Write an action-plan which outlines a step-by-step strategy for implementing key concepts, ideas.

Language

Interpretation will be provided according to the needs of the group.

Dates and Duration of Training

The program will last for two weeks (23 June to 7 July, 2001) in the US. (This was later amended to October – the agenda is attached below.)

World Learning/Macedonia

under contract to the United States Agency for International Development

Building Effective Municipal Associations Macedonia Updated September 4, 2001

B. Program Content

Daily Schedule and Description

Saturday October 6 Session 1	Departure from Macedonia The participants will depart Macedonia and travel to Tucson.
Saturday October 6 Session 2	Arrival in Tucson The participants will be met at the Tucson Airport by ITC staff, transported to the Viscount Hotel in the program's 15-passenger van. They will be assisted in settling into their rooms and will receive an orientation on emergency procedures and given contact numbers of the staff. City of Lodging: Tucson
Sunday October 7 Session 3	Visit to the Arizona-Sonora Desert Museum, <u>Experience America:</u> Site Visit to the Sonora Desert Museum (an outdoor zoo and living environment study area). This visit affords the group an opportunity to learn about the local environment, its flora and fauna and how it has shaped the community here in the desert. Because the museum is an environmental NGO, the participants will also learn of the organization's role as an advocate for environmental issues and the use of volunteers in providing services.
Sunday October 7 Session 4	Tour of Greater Tucson, Rest, Welcome Reception <u>Experience America:</u> The group will be given a Tour of the Greater Tucson area to provide a general orientation to the city. They will visit the Presidio and the "Barrio Historico" to learn about the more than two centuries of Spanish influence in this community. They will travel to "A" mountain for a panoramic view of the city and visit the famous San Xavier Mission established by the Spanish priest Padre Kino. They will learn of the rich history of the settling of the area and the "Old West" traditions. The group will attend a welcome reception at the home of Kimberly Millier. City of Lodging: Tucson
Monday October 8 Session 5	Participant and Staff Introductions and Administrative Briefing The Trainer/Facilitator, with the assistance of the Participant Trainer, will lead an interactive session to discuss the concept of training as a team learning process. In order to develop a sense of team and work effectively together, participants and staff will share personal knowledge about each other. The group will receive an ITC and World Learning administrative briefing at

World Learning/Macedonia

under contract to the United States Agency for International Development

this time that will include review of program requirements and completion of required World Learning paperwork. The staff will facilitate the cashing of participant per diem checks.

Training Objective #7,11

Monday **Program Review, Introduction to the Team Project and Explanation of the Individual Action Plans**

October 8 The Trainer/Facilitator will introduce the concepts of a Team Project (“A
Session 6 *Manual for the Development and Guidance of Professional Municipal Associations.*” Please see the Methodology description) and the related Individual Action Plans. The Trainer will emphasize the fact that these documents will be written by the participants and will be completed by the end of the program and sent to World Learning immediately.

Experience America: The participants will attend a Tucson City Council meeting where they will observe how local government functions and experience citizen participation in action.

Training Objective #1-11

City of Lodging: Tucson

Tuesday **The Power of Local Government Association and Regional Planning: A Visit to the Pima Association of Governments**

October 9 The group will visit the Pima Association of Governments and meet with Tom
Session 7 Swanson, Executive Director. They will discuss how associations of government are basically a coalition of regional governments that band together to advocate for the needs of local governments in their region and how they develop strategies to lobby for policies affecting local governance. They will also discuss the funding mechanisms for the association and how it is managed.

Training Objective #4,5,9,11

Tuesday **Transparency and Credibility: Media, Politics and the Professional Organization**

October 9 The group will meet Kay Gray, Finance Director of the City of Tucson; Rick
Session 8 Lyons, County Tax Assessor; and Nancy Stanley, Television Reporter for television station KVOA. The two local government officials are officers in their respective professional organizations. Issues to be discussed are how the respective professional organizations have instituted mechanisms to insure the organizations and their boards do not become politicized. They will also discuss the role of the media in ensuring transparency and informing the public of what is happening within an organization that makes politicization more difficult.

Training Objective #8,9

City of Lodging: Tucson

Wednesday **Building Coalitions and Developing Public Advocacy Strategies: A Workshop:**

October 10 The workshop will begin with a roundtable discussion involving Connie Fry,

World Learning/Macedonia

under contract to the United States Agency for International Development

Session 9	<p>president of the Arizona Association of County Treasurers, Maria Lopez Rogers, president of Arizona Women in Municipal Government and Catherine Connelly, Executive Director of The League of Arizona Cities and Towns. The roundtable will focus on the organizations' advocacy strategies for the Property Taxation Valuation Limitation, Seniors Bill, the Election Laws Procedures Bill and the Growing Smarter Plus Legislation and Ballot Measure.</p> <p>Training Objective #2,3,4,5,6,9</p>
Wednesday October 10 Session 10	<p>Developing Advocacy Strategies for Macedonia: A Workshop</p> <p>First the group will explain what elements need to be included into the new law on local government finance and why. The group will then be divided into sub groups and, using information gathered from the morning roundtable, begin to develop a strategy for shaping the legislation. Actions would include identifying key players, gathering and organizing support information needed, how to organize support personnel and how to use the media to create awareness and influence public opinion.</p> <p>Training Objective #2,3,4,5,6,9,11</p> <p>City of Lodging: Phoenix</p>
Thursday October 11 Session 11	<p>Membership Services, Fees and Recruitment: A Visit to the Arizona Financial Officers Association (AFOA)</p> <p>The participants meet with Craig Clifford, president of the AFOA to discuss the types of services provided to members, what types of fees are charged for the services and the elements of a successful recruitment campaign. They will also discuss the organization's fundraising activities, how they are organized, scheduled and the role of volunteers in conducting them.</p> <p>Training Objective #7,8,10</p>
Thursday October 11 Session 12	<p>Defining Your Agenda: Creating a Policy Statement - A Visit to the League of Arizona Cities and Towns</p> <p>Meeting with Catherine Connelly--the importance of establishing a policy statement that defines the position of the organization, as a representative of local government, on all aspects of governance including: economic development, public health/safety, fiscal policy and general government. The use of the policy development process as a tool for creating credibility, building commitment to the organization and recruiting new members will also be discussed.</p> <p>English speaking participants will have the opportunity to shadow the management staff of the organization to learn the practical aspects of organizational management.</p> <p>Training Objective #4,5,6,7,9</p> <p>City of Lodging: Phoenix</p>
Friday October 12 Session 13	<p>Workshop: A Case Study</p> <p>Using an actual case from a FSU country that parallels the situation of the group's problems and drawing on their newly acquired knowledge, the group</p>

World Learning/Macedonia

under contract to the United States Agency for International Development

will make a diagnostic of the organization.

Next, the group will be divided into three sub groups. One sub group will develop a fundraising plan, one will develop a management plan and the third will develop a communications plan.

Training Objective #1,6,7,9,10,11

Friday

October 12
Session 14

Work on Team Project and Individual Action Plans/Departure to Flagstaff

The group will divide into their team sub groups and each team will lead a brief discussion of the week's activities focused on that team's topics for "A Manual for the Development and Guidance of Professional Municipal Associations" This process will enable each team to gather knowledge acquired by other members of the group, review the week and broaden the perspective of their topic. The group will be provided with the form to organize their Individual Action Plan and will discuss the problems they wish to address in the plan.

The group will depart for Flagstaff in the mid-afternoon.

Training Objective #2,3,4,5,6,8,10

City of Lodging: Flagstaff

Saturday

October 13
Session 15

Cultural Activity: Visit to the Grand Canyon

The participants will travel along the south rim of the Grand Canyon, stopping at the various viewing points and the visitor's center where they will learn about the formation of the canyon.

They will also meet with park officials to discuss the mechanisms used to address issues between the federal park system and members of the Native American Nations whose territory borders the Park.

Saturday

October 13
Session 16

Cultural Activity: IMAX Theater Presentation: The Mighty Colorado

This thrilling experience takes the audience on an aerial and river trip through the canyon while explaining the geological history and exploration of the canyon and its exploration.

Place of Lodging: Flagstaff

Sunday

October 14
Session 17

Cultural Activity: Visit to Oak Creek Canyon and Sedona

The group will travel from Flagstaff to Sedona through the splendor of Oak Creek Canyon. In Sedona the group will visit the famous Church in the Rock, view the majestic red rocks, and shop for Native American crafts.

Sunday

October 14
Session 18

Travel: Return to Phoenix

After lunch in Sedona, the group will make a leisurely return to Phoenix to the hotel. The group will rest in preparation for the following week's activities

City of Lodging: Phoenix

Monday

October 15
Session 19

The Art of Lobbying

The participants will meet with Chris Herstam, lobbyist for The United Way. Chris will discuss the role of a lobbyist in the American political system, the

World Learning/Macedonia

under contract to the United States Agency for International Development

meaning of representing specific interests, how concerns are communicated and the importance of being well informed on the subject you are lobbying. They will also meet with Elaine Richardson, State Senator from District 11 to discuss the value and role of lobbyists from the perspective of a legislator.

ITC will arrange a conference call for participants to make a weekly progress report.

Training Objective #2,3,4,5

Monday

People Power: Using Coalitions to Counter the Influence of Money – A visit to Citizens for Public Representation.

October 15
Session 20

On this visit, the group will meet with Jack Fraser to discuss the power, strategies and mechanics of building coalitions of groups to advocate for or against a specific legislation. They examine the battle over controlled growth in Arizona (the “Growing Smarter Initiative”) that pitted powerful, wealthy developers against concerned citizens of limited resources. They will look at how to recruit, motivate and manage volunteers in the advocacy process.

Training Objective #3,4,5

City of Lodging: Tucson

Tuesday

How Can We Do It? Assessing Your Organization – A Management Workshop

October 16
Session 21

Using each organization’s strategic plan, the group will be divided into their respective organizations and an analysis of the organizations’ capabilities and resources compared to the goals of the strategic plan. Using the organizational structure of the associations they have visited as models, the participants will compare their own organization’s structure to determine if the use of organization staff could be improved. They will also discuss the relationship of responsibility and authority and write clear job descriptions for each position in their association.

Training Objective #1,7,11

Tuesday

Leadership, Management and Supporting Your Staff: A Management Workshop

October 16
Session 22

The afternoon session will focus on the concept of leadership and its role in the management process. The group will also examine the “tools of management” and how they can be developed and improved. The groups will look at lines of communications and the interpersonal skill of communicating. They will examine how job descriptions, performance measurement and feedback help develop staff members’ skills, increase motivation and improve efficiency. They will also look at the different requirements of managing volunteers.

The participants will attend the board of director’s meeting of the Pima Association of Governments. They will observe the types of policy and guidance issues the board addresses.

Training Objective #1,6,7,11

City of Lodging: Tucson

World Learning/Macedonia

under contract to the United States Agency for International Development

Wednesday October 17 Session 23	Support Your Organization! Laying the Foundations of Fundraising The focus of this session will be to broaden the concept of fundraising, moving the emphasis from grants to locally based, more sustainable activities. The group will review the types of fundraising activities they have discovered in their visits to organizations and discuss which of them might be used in Macedonia. Then the group will be divided into three sub groups and each sub group will select one type of fundraising activity and design a plan for implementing the event. Training staff will serve as a resource for questions and procedures on planning activities. Training Objective #10
Wednesday October 17 Session 24	Continued Development of the Team Project and Individual Action Plans This will be a working session during which the teams will continue to gather, organize and write down their newly acquired knowledge on the topics of the Team Project: <i>"A Manual for the Development and Guidance of Professional Municipal Associations"</i> They will also work on the development and coordination of their individual action plans. Training Objective #1-11 City of Lodging: Tucson
Thursday October 18 Session 25	Drawing Members into Your Vision: Recruiting, Retaining and Motivating Members Reflecting on the visits and information gathered during the program, the group will discuss and define the expectations of their membership. They will discuss how to articulate those expectations in a clear simple vision. Based on those expectations they will identify activities to improve understanding of the organizations actions, provide services that address felt needs and engage the membership in the work of the association. Training Objective #6,7,8,9
Thursday October 18 Session 26	Be Connected! How to Communicate with Your Members and the World This session will focus on the various purposes of communications: 1) building credibility among constituents and members and the government, 2) building coalitions for advocacy, 3) informing members and customers of services and 4) keeping the public informed on legislation affecting their lives. The group will discuss how best to match the medium to the purpose of the communication as well as the who and how of scheduling communications. Awards Ceremony Training Objective #5,6,7 City of Lodging: Tucson
Friday October 19	Completion of the Team Project and Individual Action Plans Writing of the document will have been completed by the beginning of this

World Learning/Macedonia

under contract to the United States Agency for International Development

Session 27 session. Each topic team will make a presentation of the contents of their section of the “Manual.” The document will be reproduced, bound and distributed to the participants and World Learning.

Training Objective # 1-11

Friday

October 19

Session 28

Program Review and Evaluation

The staff will lead a discussion and review of the overall program. The participants will complete a written evaluation of the program.

Training Objective #

City of Lodging: Tucson

Saturday

October 20

Session 29

Departure for Macedonia

The group will be escorted from the hotel to the airport by program personnel (Braaton and Millier) and transported to the airport via the rental van. Project personnel will help the participants through the check-in process and make sure all are on the plane as it departs for Macedonia.